**[IOA CONFERENCE OMBUDS TOOLKIT](https://www.ombudsassociation.org/resources-for-conference-contract-ombuds)**

**SAMPLE CHARTER**

**[NAME of Sponsoring Organization]**

**Charter for [Identify Conference] Ombuds**

**Establishment of Conference Ombuds Program**

To support [Sponsoring Organization's] commitment to its [Code of Professional Ethics] and its [Conference Code of Conduct or other applicable policies], the [Sponsoring Organization] has decided to provide organizational ombuds services in connection with its [Identify conference by title, location and dates] ("Conference Ombuds Program"). The [Sponsoring Organization's] goal is to have a conference that is as inclusive and accessible as possible for attendees, regardless of gender, sexual orientation/identity, race/ethnicity, religion, employment status or status in the field. In addition, the [Sponsoring Organization] desires to improve the conduct and climate at future conferences with aggregate data and non-confidential feedback on trends and recommendations from the ombuds.

The Conference Ombuds Program is designed to be an independent, impartial, off-the-record, and confidential channel for Conference attendees to discuss any issues they may have concerning Conference related activities. The ombuds selected to provide these services ("Conference Ombuds" or "Ombuds") will be available to provide information confidentially and will provide a safe place for people to discuss such issues as safety, actions from "overly-friendliness to harassment, micro-aggressions, free speech, integrity, privacy, conflicts of interest ( including accessibility, lodging, and food), alcohol consumption and conference cliques. The Ombuds is a resource to informally discuss any of these or other conference-related concerns and help inquirers develop options, problem-solve, create paths for self-advocacy, and make informed choices about the best path forward.

This Charter sets forth the operating principles under which the Conference Ombuds Program will operate and reflect the {Sponsoring Organization's} commitment to the Conference Ombuds and the role of this position.

**Standards of Operation**

The [Sponsoring Association] Conference Ombuds shall be a member of the International Ombudsman Association (IOA) and shall adhere to IOA's Code of Ethics and Standards of Practice in performing ombuds services for the [Sponsoring Organization] [provide link to IOA website for locating these documents]. These tenets require organizational ombuds programs to be independent, neutral, informal, and confidential:

1. Independence

The Conference Ombuds is an independent contractor and not a member of {Sponsoring Organization]. The Ombuds functions outside existing administrative structures pursuant to a Services Agreement between the Conference Ombuds and [Sponsoring Organization].

2. Impartiality

The Conference Ombuds provides impartial assessments of concerns. As a neutral third-party, the Ombuds is a resource for equitable and fair process, and the fair administration of process. The Ombuds does not, however, provide legal or other kinds of advocacy or enforce the [Sponsoring Organization's] Code of Professional Conduct and Ethics. The Conference Ombuds does not render services or become involved in any matter that would be a conflict of interest for the Conference Ombuds to do so.

3. Informality

The Conference Ombuds provides a means for off-the-record discussions of concern. The Ombuds is empowered to provide only informal assistance, and does not conduct investigations, make or override decisions, determine policy, testify or participate in formal or administrative proceedings with respect to confidential communications, provide legal advice, or accept legal notice of claims against [Sponsoring Organization] or any other organization, entity, or person. For those wishing to assert claims or have on-the -record communications, the Conference Ombuds can identify resources to appropriate formal channels so that individuals may make informed choices about which process they decide is best for them to pursue.

4. Confidentiality

Communications with the Conference Ombuds are confidential to the maximum extent permitted by law. This principle of confidentiality helps the Conference Ombuds provide a safe place for conference attendees to voice concerns, evaluate issues, and identify options for possible further action. The Conference Ombuds is a purely voluntary resource. No one is required to use it, but those who do will be deemed to have agreed to respect and abide by the above principles on which it was created and not to call the Ombuds to testify or produce documents related to confidential communications in any administrative or legal proceeding. The [Sponsoring Organization] has also agreed not to call upon or attempt to have the Conference Ombuds disclose confidential communications or to testify or produce documents relating to confidential communications in any administrative or legal proceeding.

Consistent with the International Ombudsman Association Code of Ethics and Standards of Practice, the only exceptions to this confidentiality principle are: (a) when, during the course of communications with the Conference Ombuds, an inquirer gives the Ombuds permission to make a disclosure and the Ombuds agrees it is appropriate to do so, or (b) when the Conference Ombuds determines that there is an imminent threat of serious harm.

**Scope of Services**

The Conference Ombuds will be available to consult with conference attendees concerning any conference-related issues identified above. The Conference Ombuds will be available on-site at the [Conference], and conference attendees will be advised how to contact the Ombuds as well as the times and places where the Ombuds may be found.

As a neutral third-party, the Ombuds is an advocate for fair and equitable process. The Ombuds does not, however, provide legal or other kinds of advocacy or enforce the [Sponsoring Organization's] Code of Professional Conduct and Ethics.

[Optional: The Conference Ombuds has been authorized to continue to assist inquirers after the conference for a limited period of time where continuing consultation has not been concluded or when an issue is raised in a reasonable time following the conference.]

**Accountability and Reporting**

The Conference Ombuds reports to [specify whether it is to the Sponsoring Organization's Executive Director, Board of Directors, Executive Committee or some other person or entity]. The Ombuds may also meet with and alert senior leadership of [the Sponsoring Organization} of any systemic issues or trends the Ombuds believes may help the organization address identified or potential issues, improve the climate for membership or future conferences, or improve its policies and practices. Even when reporting issues to senior leadership, the Conference Ombuds *will do their best to protect*the confidentiality of those using the Ombuds' services.

**Record Keeping**

The Ombuds provides only informal assistance, and although informal notes may be temporarily created only as needed, the Ombuds does not retain permanent records containing personally identifiable information or confidential communications. Any post-conference reporting to senior leadership will contain only aggregate data and the Ombuds insights and observations on the types of issues raised an any organizational recommendations.